

# Providing Financial Services

## SCQF LEVEL 5 MODERN APPRENTICESHIP



 12 Month Programme

This qualification has been designed for learners that are new to the financial services sector, supporting them to develop the relevant key skills needed with a focus on regulatory compliance.

### Introduction to the course

Learners will develop their knowledge on the rules and regulations of the banking industry and how these apply to their day to day role. They will learn the importance of personal and professional planning and development, and how to set up and the importance of reviewing their development plan.

The optional units will be chosen to suit the role of the apprentice and will support and stretch the learner building the knowledge and skills they need to succeed in their day to day role.

### Learner outcomes

For branch staff, learners can choose to focus on, developing their knowledge on counter transactions, opening accounts and improving their customer service skills.

For call centre staff they can focus on, developing their customer service skills, delivering banking services over the telephone and how to work collaboratively within a team.

The apprenticeship will support the learner to develop their communication and IT skills within the workplace, aiding them to communicate effectively and professionally with stakeholders

### Assessment

Assessment is through performance in the workplace and will be based on performance evidence, i.e. observation (in person, screen sharing) and work products generated by the candidate (word-processed documents, letters, spreadsheets, travel/accommodation bookings, receipts, e-mail correspondence, database reports, graphic elements, etc.). The specific evidence produced will depend on the choice of optional units.

### A good fit for

Employees with little or no experience of financial services.

### What's next?

Completion of the apprenticeship will allow learners to progress in their career within the Financial Services sector at a higher/promoted level.

### Course overview



**Start Date**  
Flexible



**Level**  
SCQF Level 5



**Duration**  
12 months



**Delivery**  
Blended



**Assessment**  
Workplace assessments



**Qualification**  
Providing Financial Services at SCQF level 5



**Entry Requirements**  
Learners should be in a job or placement where they are carrying out relevant tasks which allow them to gather the required evidence, and the learner must be supervising at least one member of staff. No prior qualifications or knowledge are required to undertake this qualification.

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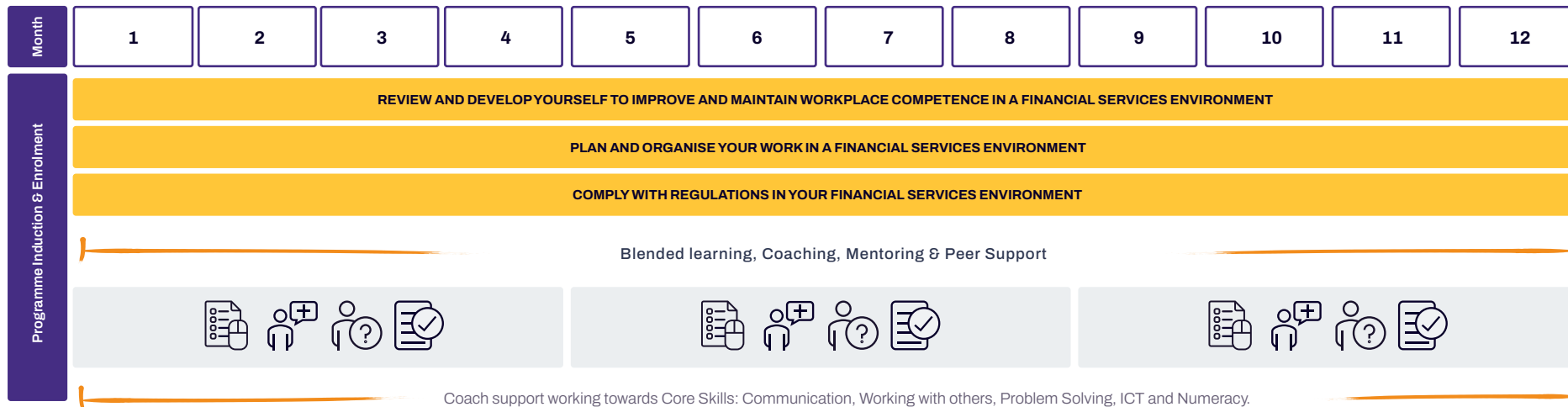


unlocking potential  
delivering personalisation  
enhancing performance

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## Blended Delivery Model



### Key



Online learning



Progress reviews



Assessment visit



Optional units

The optional units available will be discussed with your skills coach at the start of the programme, as part of your personal development plan.